## Agency Header (2400) & Division Descriptions (2500)

Initiator: Any budget employee
Reason: To fill out the necessary forms in the budget.

These two forms make up the Agency Introduction as described in the Budget Development Manual (BDM). The Division Description, Form 2500 will flow into the Division Description Report (B-3).

Agency Header – Form 2400

Select the form from the Budget Forms drop-down. Form 2400 will be at the top of the menu and Budget Form #1.
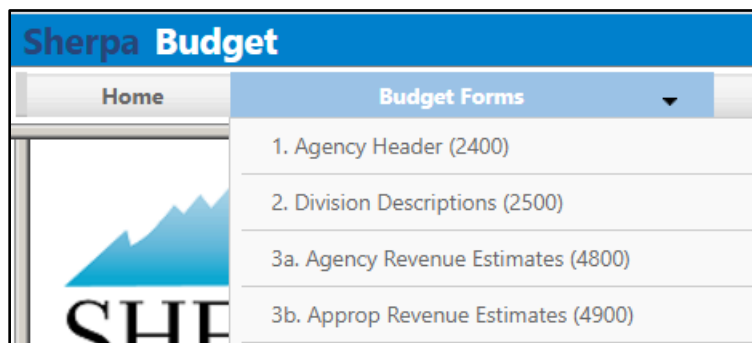
Once selected, the system opens the Summary Overview Screen. This screen will list all entries that have a stage that matches the user's access in the system. (i.e. the form has not been "submitted" or move to other stages (workflows) or it has been returned to the user through the stages (workflows)).
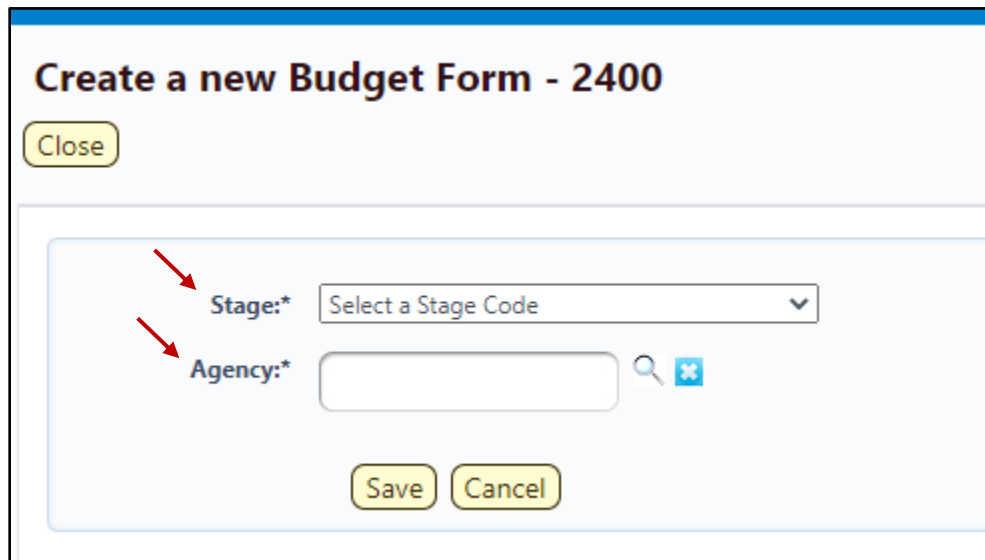

Select "Add New" for the first entry.

Add New – will initiate the screen below:

1. If completing the initial entry, select the appropriate stage. A budget form does not need to start in Stage 1.
2. Then select the appropriate agency. The only agency(ies) that should appear are the agency(ies) for which you have been granted access.
3. Once complete, select Save.

You have now created a "Parent Transaction".

Budget Form Header:

After selecting the Save Record Action Button on the initial screen, the Header will appear.

Data fields shown above are auto-populated on this screen. Most of the fields are system generated such as the top line outlined in red and are not able to be edited.

Statutory Authority*

- The overall statutory authority for the agency will be loaded into a master data table for the agency and will show up on the Executive Detail Budget Report as the overall statute. This will be auto-populated by the system. A manual change will only be necessary if there is a statutory change for the overall agency.

Before saving the form, review all the data on this screen to ensure it is correct. Once saved, a green message will appear at the top of the screen stating:
Agency Header (2400) was successfully updated.

Attachment Tab:

The functionality of the Attachment Tab is identical on all Budget Forms in the Luma Budget System.

The following documents need to be attached in the Agency Header – Form 2400, updated annually by all agencies, and to accompany the agency budget (as needed) with submission:
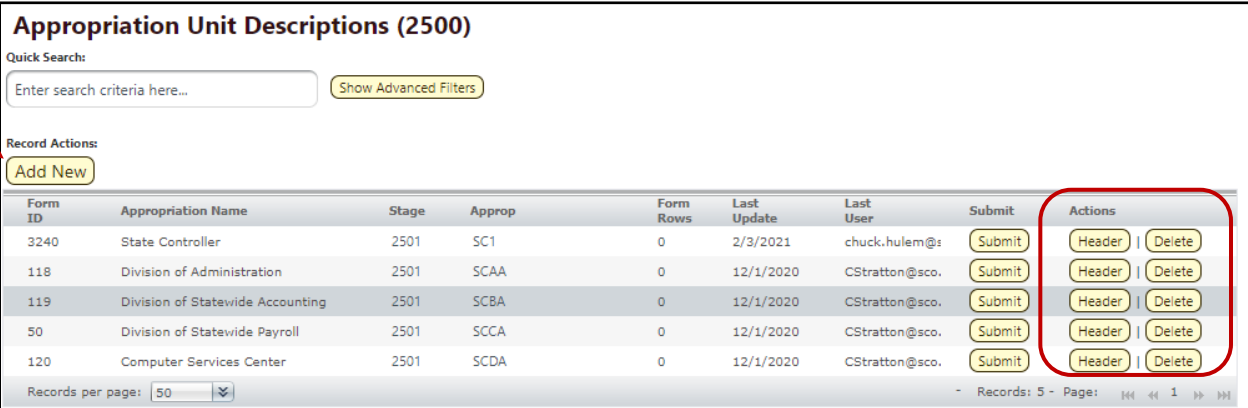
- Organizational Charts (PDF Only)
- 5-year Capital Needs Plan
- Federal Fund Inventory
- Performance Report
- Permanent Building Fund Capital Budget Request

Note: If there is a need to print any of the Luma Budget Parent transactions, the attachment documents will need to be printed separately.

Division Descriptions - Form 2500

An initial Parent Transaction must be created for each division within the agency. When filling out the narrative, it may help to think of this as a description of the budget(s) as they run through JFAC vs. the agency organizational structure. You can use the Legislative Budget Book entry for your agency as a reference and to find the current wording.

There is no Detail tab on this form since there is no financial information required.

Appropriation Unit Descriptions (2500)

Quick Search:

| Enter search criteria here… | Show Advanced Filters |

Record Actions:

Add New
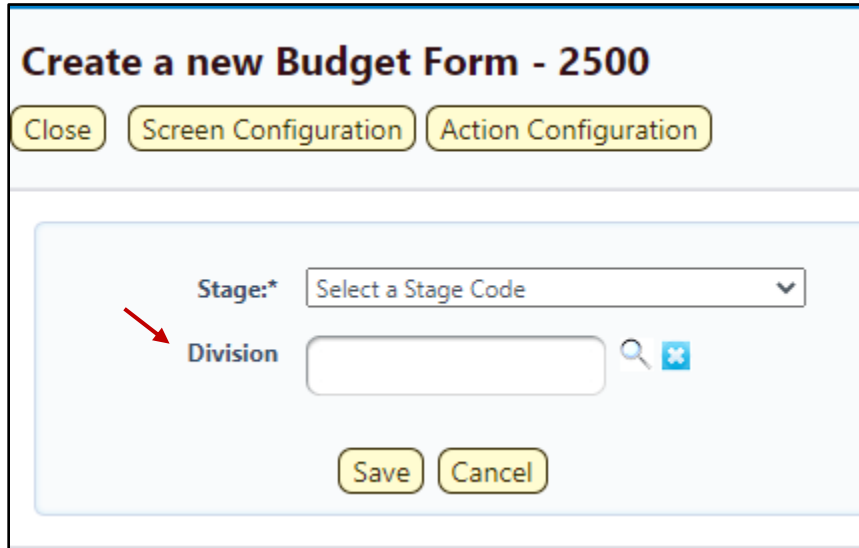
Form ID	Appropriation Name	Stage	Approp	Form Rows	Last Update	Last User	Submit	Actions
3240	State Controller	2501	SC1	0	2/3/2021	chuck.hulem@s	Submit	Header | Delete
118	Division of Administration	2501	SCAA	0	12/1/2020	CStratton@sco.	Submit	Header | Delete
119	Division of Statewide Accounting	2501	SCBA	0	12/1/2020	CStratton@sco.	Submit	Header | Delete
50	Division of Statewide Payroll	2501	SCCA	0	12/1/2020	CStratton@sco.	Submit	Header | Delete
120	Computer Services Center	2501	SCDA	0	12/1/2020	CStratton@sco.	Submit	Header | Delete

Records per page: 50   - Records: 5 - Page: |◀ ◀ 1 ▶ ▶|

Add New will bring up the Create a new Budget Form – 2500 dialog box.

Select the appropriate Stage number.

Select the Division code(s) in Luma Budget. This is a budget summary level that summarizes the budget(s) grouping(s) as it will be reviewed by JFAC.

The Division for the State Controller's Office (SCO) is circled below and is part of the hierarchy of the system.

Select the agency division(s) that need to be populated with a description. Each division will need a Parent Transaction. For example, in the multiple division mock-up below, the SCO will need to enter five (5) Parent Transactions and a narrative for each division.

Header Tab:

This description will be used to populate the Division Description Report (B3). If a change in the description is made, select the Description Changes box. If there are no changes just submit the budget form without selecting the checkbox.

Following the go-live of the Luma Budget system and the completion of interfaces, the current and prior year appropriation bills will auto-populate for each agency via an interface with the LSO budget database.

Here is how this is achieved:
- Prior year appropriation bill number(s)* - Luma Budget, as part of the reopening of a new budget cycle will take the data that was populated in the Current Year appropriation bill number(s) and move it to this data field.
- Current year appropriation bill number(s)* - This bill number will be populated via a data exchange with the Legislative Services Office (LSO) system. The current year-approved bill number will be automatically uploaded from the LSO system.
- For the first year of implementation, the prior year's bill number, and the current year's appropriation bill number(s) may need to be manually populated.

Result
You successfully completed the Agency Header (2400) and Division Description (2500).

For additional training, please visit the SCO website and Luma Training Portal in the Training tab.

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Version 1